USDA Weekly Retail Turkey Feature Activity

Fri. Apr 04, 2014

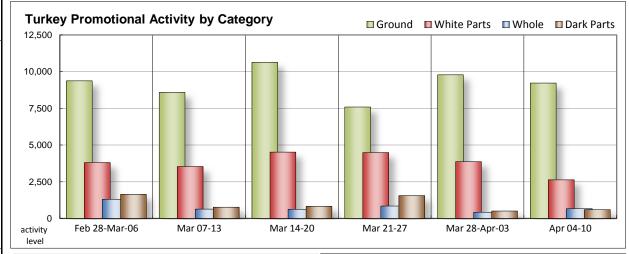
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/04 thru 04/10.

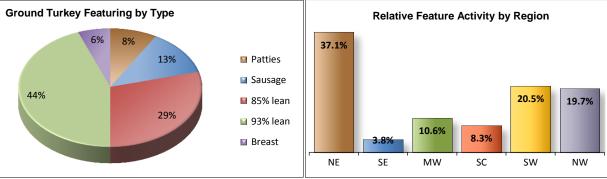
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY											
	ı	WEEK	1	WEEK	LAST	YEAR					
		of 22,900		of 22,900	33.9% of 23,200 outlets 6.3%						
Feature Rate 1/		tlets		tlets							
Special Rate 4/		2%		.2%							
Activity Index 2/		,580		,140	11,910						
3/	Stores	Wtd Avg	Stores	Stores Wtd Avg		Wtd Avg					
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens	420	1.21	230	1.01	110	0.99					
" - Toms	250	1.06	190	0.90							
PARTS:											
Breast:											
Bone-in, whole											
Fresh	20				10						
Frozen	940	1.56	1,770	1.72	320	2.04					
Split, bone-in											
Fresh					10						
Rotisserie	50		100	7.56	200						
Boneless, whole	140				40						
Cutlets	440		1,050	4.79	80	5.76					
Cutlets, thin sliced	310	4.98									
Strips					130	4.99					
Tenders	60	4.85	230	4.54	290	4.39					
Marinated Tenders	670	3.99	720	4.32	300	4.72					
Drumsticks	230	1.82	110	1.87	80	1.94					
Thighs	20		10		60						
Wings	30	2.09	180	2.21	20	1.99					
Necks	10										
Smoked Drumsticks	150		150	-	190						
Smoked Wings	150		40		260						
Smoked Necks	10		20		20	1.99					
GROUND TURKEY:	9,220	3.31	9,780		8,210	3.17					
Patties	770		990		650	3.60					
Sausage	1,150		2,040		1,610						
85% lean	2,690		1,710		2,650						
93% lean	4,080		2,920		2,500						
Breast	530		2,120		800						
Rolls (frsh/frz 1 lb.) Specialty ^{5/}	200	1.93	30	2.79	320	1.97					
Patties			290	4.99	140	4.73					
93-94% lean	1,000	4.48	550 550		1,110						
Breast	260		690	-	1,110	6.99					
Note: rolls & specialty no											

This Week's Turkey Feature Highlights

Retail activity on turkey declines as we head closer to Easter and Passover. There are a few more frozen turkeys in this week's circulars and kosher turkeys are making an appearance. The number of stores offering frozen bone-in breasts dropped dramatically; prices are lower. Few grocers seem interested in promoting rotisserie breasts this week. Offerings of white boneless cuts decline; marinated tenders are the most actively promoted and the lowest priced item in this category. There is a slight increase in offerings on dark parts; prices are mostly lower. Promotional activity declines on ground turkey; the weighted average price is sharply lower due to fewer ads for ground breast. Offerings increase on 85% and 93% lean. Most of the ads for specialty turkey center on 93% lean this week. Deli feature activity increases due to the large increase in self-service deli. Stores increased promotions on processor brands, showing fewer private brands. Service deli offerings increase on thick slicing meats, which are priced lower this week. The increase in service deli promotions comes from more processor brands being featured; prices are mostly lower on self-service deli items.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.

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	NORTI	HEAST U.S.			SOUTH	IEAST U.S.	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 29.4% of 4,200 sampled outlets					
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AI	.,FL,GA,MS	,NC,SC,TN,VA,W						
	·	0 sampled outlet		†		0 sampled outlet						
Special Rate 4/	6.6% of stores w	/ no-price promo	tions	0.0%	0.0% of stores w/ no-price promotions				4.9% of stores w/ no-price promotions			
Activity Index 2/		Index = 6,910		Activity Index = 970				Activity Index = 1,790				
ricarricy and ox	Price Range	Price Range Summary				Price Range Summary						
	(\$/pound)	Stores V	/td Avg	(\$/po		·	Vtd Avg	(\$/pound)		Vtd Avg		
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens	1.39 - 1.69	170	1.45									
" - Toms												
PARTS:												
Breast:												
Bone-in, whole												
Fresh												
Frozen	1.48 - 1.99	290	1.65	0.99 -	1.59	160	1.37	1.49 - 1.99	190	1.60		
Split, bone-in												
Fresh												
Rotisserie	6.99	20	6.99					7.99 - 9.99	30	9.52		
Boneless, whole	3.99	10	3.99									
Cutlets	4.59 - 5.49	420	4.99					4.99	10	4.99		
Cutlets, thin sliced	4.79 - 4.99	180	4.98									
Strips												
Tenders					4.99	10	4.99					
Marinated Tenders	4.26	410	4.26	3.19 -	4.26	40	4.09	3.19	120	3.19		
Drumsticks	1.69 - 2.29	200	1.81					1.69 - 1.99	30	1.88		
Thighs	2.29	20	2.29									
Wings	2.29	20	2.29					1.69	10	1.69		
Necks								1.69	10	1.69		
Smoked Drumsticks	1.99	150	1.99									
Smoked Wings	1.99	150	1.99									
Smoked Necks								1.99	10	1.99		
GROUND TURKEY:												
Patties	3.00 - 3.99	360	3.79	3.00 -		220	3.05	3.49 - 3.50	130	3.49		
Sausage	2.79 - 3.99	690	3.41	3.39 -	3.99	20	3.69	2.87 - 3.99	300	3.75		
85% lean	1.99 - 3.07	1,650	2.60	2.39 -		170	2.60	1.98 - 3.00	150	2.42		
93% lean	2.22 - 3.84	1,450	3.18	2.98 -	3.99	340	3.12	2.91 - 4.00	430	3.45		
Breast (99-100% lean)	4.61 - 5.59	320	5.30					3.99 - 4.99	100	4.12		
Rolls (frsh/frz 1 lb.)	1.39	20	1.39					2.00	30	2.00		
Specialty ^{5/}												
Patties												
93-94% lean	3.99 - 5.99	380	4.98		3.99	10	3.99	3.99	240	3.99		
Breast												

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USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 04/04 thru 04/10.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH	CENTRAL U.S.			HWEST U.S.	NORTHWEST U.S.					
	(AR,AZ,CO,KS,	LA,MO,NM,OK,TX	,UT)		A,HI,NV)		(AK,ID,MT,OR,WA,WY)				
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	0.0% of stores v	00 sampled outle v/ no-price promo v Index = 1,400	tions	41.1% of 2,800 sampled outlets 8.2% of stores w/ no-price promotions Activity Index = 2,510				71.9% of 1,200 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,000			
	Price Range (\$/pound)	Summar Stores V	y Vtd Avg	Price Ra (\$/pour	_	Summa Stores	iry Wtd Avg	Price R (\$/poi	_	Sumr Stores	nary Wtd Avg
WHOLE BIRDS: Fresh - Hens " - Toms											
Frozen - Hens " - Toms				0.99 - 1 0.99 - 1		250 250	1.06 1.06				
PARTS: Breast: Bone-in, whole Fresh	2.69	20	2.69								
Frozen Split, bone-in Fresh Rotisserie	1.29 - 1.59	210	1.49		1.99	10	1.99	1.49 -	1.79	80	1.65
Boneless, whole Cutlets	3.99	10	3.99	4	4.99	130	4.99				
Cutlets, thin sliced	3.99	10	3.99	4	4.99	130	4.99				
Strips Tenders	3.99 - 4.99	50	4.82								
Marinated Tenders Drumsticks	3.66	30	3.66					3.66 -	3.99	70	3.89
Thighs Wings Necks											
Smoked Drumsticks Smoked Wings Smoked Necks											
GROUND TURKEY:											
Patties	3.79	20	3.79	3.68 - 3	3.79	40	3.79				
Sausage 85% lean	2.39 - 3.20	260	2.69	2.66 - 2		140 300	3.70 2.80	2.33 -	3 20	160	2.43
93% lean	2.91 - 4.00	540	3.69	3.03 - 4		680	3.91		4.00	640	3.67
Breast (99-100% lean)	4.16 - 4.39	70	4.32		4.99	10	4.99	4.39 -		30	4.84
Rolls (frsh/frz 1 lb.)	1.99	80	1.99		1.99	50	1.99		1.99	20	1.99
Specialty ^{5/} Patties											
93-94% lean Breast	5.00	110	5.00	3.99 - 4 3.99 - 5		260 260	4.01 4.04				



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

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Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/04 thru 04/10.

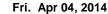
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY			NORTHE.	NORTHEAST U.S.		SOUTHEAST U.S.		
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,N	IH,NJ,NY,PA,RI,VT)	(AL,FL,GA,MS,NC,SC,TN,VA,WV)			
	77.6% o	f 22,900	70.7% o	f 22,900	76.3% o	f 23,200						
Feature Rate 1/	sto	res	sto	res	sto	res	95.0% of 4,700 sa	ampled outlets	67.9% of 5,900 sampled outlets			
And in the Inc. Inc. Of	40	200	4.4	000	40	0.40	Activity Inde	•		Activity Index = 9,940		
Activity Index 2/	49,	360	44,	630	42,	840	Price Range	Summary	Price Range	Summary		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	(\$/pound) Stores W		
SERVICE DELI - Turkey												
Category 1												
Processor Brand	6,050	8.04	4,730	8.18	6,510	8.41	6.97 - 9.99	2,460 8.24	6.99 - 8.99	1,430	7.78	
Private Brand	1,720	7.46	1,230	8.26	1,420	7.95	6.99 - 7.99	1,410 7.46				
Category 2												
Processor Brand	3,530	5.83	4,220	5.90		6.11		1,350 5.62	4.99 - 6.48	310	6.01	
Private Brand	3,620	6.69	7,790	6.05	3,100	6.63	4.98 - 7.00	670 6.03	5.99 - 7.00	250	6.66	
Category 3												
Processor Brand	940	4.08	1,950	4.17	660	3.90		480 4.14	3.88 - 3.99	100	3.96	
Private Brand	210	5.88	1,350	4.84	1,820	4.98	5.48 - 5.99	210 5.88				
Turkey Ham												
Processor Brand	260	4.03	270	3.22	580	3.71	2.49 - 4.99	150 4.32	4.99	20	4.99	
Private Brand												
Turkey Pastrami												
Processor Brand	220	4.59	440	3.88	580	4.16	2.69 - 4.99	180 4.51	4.99	20	4.99	
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,050	7.56	1,720	7.39	,	7.70		790 7.69	6.99 - 8.99	750	7.11	
Private Brand	730	7.26	1,920	7.68	430	6.99	7.99	240 7.99				
Category 2												
Processor Brand	180	4.96	220	4.95	390	5.42		140 4.99				
Private Brand	160	6.08	1,110	4.99	1,630	5.22	2					
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz	40.040	0.04	7.400	0.00	0.450	0.00		0.400	0.00 0.50	0.040	0.04	
Processor Brand	12,310	2.84	7,120	3.06	9,150	3.00		2,160 3.17	2.00 - 3.59	2,610	2.91	
Private Brand	1,070	2.63	930	3.20	200	2.82	2.48 - 3.00	350 2.89	1.99 - 2.99	400	2.15	
Turkey 16 oz Processor Brand	2 110	4 27	2 020	4.18	290	1 2 1	3.00 5.00	640 4.84	2.00 4.00	1.050	4.00	
Processor Brand Private Brand	2,110	4.37	2,030	4.18	290	4.34	3.99 - 5.99	040 4.84	3.99 - 4.99	1,050	4.00	
Chicken 7-10 oz							1					
Processor Brand	12,260	2.84	6,710	3.07	9,070	3.00	2.50 - 4.00	2,160 3.17	2.00 - 3.59	2,600	2.91	
Private Brand	940	2.64	890	3.23	200	2.82		2,160 3.17	1.99 - 2.99	400	2.91	
Filvate Dialiu	540	2.01	090	5.25	200	2.02	2.40 - 2.33	230 2.97	1.33 - 2.33	400	2.10	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 04/04 thru 04/10.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDWEST U.S.			ENTRAL U.S.	SOUTHW	/EST U.S.	NORTHWEST U.S.		
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA,F	HI,NV)	(AK,ID,MT,OR,WA,WY) 74.9% of 1,200 sampled outlets		
Feature Rate 1/									
		sampled outlets	*	0 sampled outlets	·	sampled outlets			
Activity Index 2/	Activity Index = 11,140		Price Range	ndex = 9,120 Summary	Price Range	dex = 3,150 Summary	Activity Index = 2,390 Price Range Summary		
	Price Range (\$/pound)	Summary Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Summary Stores Wtd Avg	
SERVICE DELI - Turkey	(ф/рошта)	Otores Wid Avg	(φ/ροαπα)	Otores Wid Avg	(ψ/ροαπα)	Oloics Wid Avg	(ψ/ροατία)	Otoles Wid Avg	
Category 1									
Processor Brand	6.99 - 9.99	970 8.19	6.99 - 9.49	790 7.90	6.48 - 9.49	150 7.44	6.99 - 7.99	250 7.87	
Private Brand	6.99 - 10.99	170 7.63	6.49 - 7.49	140 7.32	00		0.00	200 1101	
Category 2									
Processor Brand	4.99 - 6.99	1,330 6.07	4.99 - 6.99	330 6.01	4.99	170 4.99	4.98 - 5.99	40 5.49	
Private Brand	4.99 - 7.00	470 6.19	4.99 - 7.00	1,140 6.98	7.00	540 7.00	7.00	550 7.00	
Category 3									
Processor Brand	3.99 - 4.88	150 4.06	3.79 - 4.49	150 4.12	3.59 - 3.99	60 3.71			
Private Brand									
Turkey Ham									
Processor Brand					2.99 - 3.79	80 3.42	2.69	10 2.69	
Private Brand									
Turkey Pastrami									
Processor Brand	4.89	20 4.89							
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.49 - 9.99	770 7.12	5.99 - 9.49	270 7.20	6.38 - 9.99	310 9.48	6.99 - 11.99	160 8.00	
Private Brand	7.99	20 7.99	5.99 - 7.99	470 6.85					
Category 2									
Processor Brand	3.99 - 4.99	40 4.84							
Private Brand	5.99 - 6.98	160 6.08							
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz	4.00 0.00	2.040 0.00	4.00 0.40	0.000 0.75	0.50 0.00	000 0.70	0.50 0.00	000 000	
Processor Brand Private Brand	1.99 - 3.99 2.50 - 3.29	3,240 2.66 180 2.99	1.80 - 2.19 2.50 - 3.29	2,690 2.75 140 2.89	2.50 - 2.99	920 2.76	2.50 - 3.99	690 2.88	
Turkey 16 oz	2.50 - 3.29	100 2.99	2.50 - 3.29	140 2.09					
Processor Brand	3.99 - 4.99	210 4.73	3.99 - 4.99	210 4.43					
Private Brand	J.JJ - 4.99	210 4.73	J.JJ - 4.99	210 7.43					
Chicken 7-10 oz									
Processor Brand	1.99 - 3.99	3,240 2.66	1.80 - 2.49	2,650 2.76	2.50 - 2.99	920 2.76	2.50 - 3.99	690 2.88	
Private Brand	2.50 - 3.29	170 2.99	2.50 - 3.00	140 2.87				2.00	
1 mate Bland	2.00 0.20	2.00	0.00	2.0,	I	1	ı	L	

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Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

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